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### European perspectives on the learning organisation

Nyhan, B.; Cressey, P.; Tomassini, M.; Kelleher, M.; Poell, R.F.

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# *European perspectives on the learning organisation*

by:

**Barry Nyhan**

Cedefop - European Centre for the development of vocational training  
Thessaloniki, Greece  
[bn@cedefop.eu.int](mailto:bn@cedefop.eu.int)

**Peter Cressey**

School of Social Sciences, University of Bath, UK  
[hsspc@bath.ac.uk](mailto:hsspc@bath.ac.uk)

**Massimo Tomassini**

ISFOL- Istituto per lo sviluppo della formazione professionale dei lavoratori, Roma  
[m.tomassini@isfol.it](mailto:m.tomassini@isfol.it)

**Michael Kelleher**

Learning Futures Ltd, Wales, UK  
[michael.kelleher@learningfutures.co.uk](mailto:michael.kelleher@learningfutures.co.uk)

**Rob Poell**

Tilburg University , Department of Human Resource Sciences  
Tilburg, The Netherlands  
[R.Poell@utv.nl](mailto:R.Poell@utv.nl)

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### **Abstract**

This paper, based on a publication entitled 'Facing up to the learning organisation challenge' published in April 2003, provides an overview of the main questions emerging from recent European research projects related to the topic of the learning organisation. The rationale for focusing on this topic is the belief that the European Union goals related to 'lifelong learning' and the creation of a 'knowledge-based society' can only be attained if the organisations in which people work are also organisations in which they learn. Work organisations must become, at the same time, learning organisations.

This paper has four main messages. The first is that, in order to build learning organisations, one has to ensure that a) there is coherence between the 'tangible' (formal/objective) and the 'intangible' (informal/subjective) dimensions of an organisation; and b) that *the organisation's* learning' goals are reconciled with individuals' learning needs. The complexity involved in ensuring the right balance between these different dimensions, means that in the final analysis one cannot realistically expect more than incomplete or imperfect learning organisations. However, this does not in any way negate the validity of the quest to reconcile these competing but 'real' interests.

The second message is that challenging or developmental work is a prerequisite for implementing a learning organisation. One of the keys to promoting learning organisations is to organise work in such a way that it promotes human development. The third message is that the provision of support and guidance is essential to ensure that developmental work does in fact provide opportunities for developmental learning. The fourth message is that to address organisational learning there is a need for boundary-crossing and interdisciplinary partnerships between the vocational education and training and human resource development communities.

# 1. Introduction

This paper, based on a publication entitled ‘Facing up to the learning organisation challenge’ <sup>(1)</sup> published in April 2003, discusses the European challenge in building work organisations that are both economically efficient and good places to work and learn – in other words, learning organisations. The paper which is reporting on the work undertaken in the context of the ‘Cedra (Cedefop research arena) learning organisation’ project <sup>(2)</sup> sets out to analyse and interpret what is happening in recent European research and development work dealing with the learning organisation and organisational learning <sup>(3)</sup>. (See Annex for a list of the research papers that were analysed.) It attempts to elucidate the issues, dilemmas and challenges arising from a number of research projects with the view to assisting vocational education and human resource development policy makers – from employer, trade union and government backgrounds – to devise policies that will promote learning at work.

Following this brief introduction, the second part of this paper presents the rationale for focusing on the learning organisation in a European policy context. Part three outlines a number of current criticisms of the learning organisation concept. The fourth part briefly addresses some of these critiques as a prelude to a discussion in part five on the necessity to move to a new agenda regarding the learning organisation. Part six of the paper analyses the dilemmas and tensions that have to be understood before beginning to tackle organisational learning. The final part seven examines some key principles to be adhered to so that productive organisational learning can in fact take place.

## 2. The learning organisation and the European policy context

The Lisbon EU Summit of the European Council in 2000 declared that one of the strategic goals for the European Union over the next decade is to become ‘the most competitive and dynamic knowledge-based economy in the world capable of sustainable economic growth with more and better jobs and greater social cohesion’. In 2001, the European Commission published a Communication entitled ‘*Making a European area of lifelong learning a reality*’ the aims of which are to meet the goals of an expanding European Union ‘to be more prosperous, inclusive, tolerant and democratic’ (European Commission, 2001: p.3). Most learning – for good or for bad – takes place in everyday life and work social situations. In other words, most of our learning is informal learning taking place in a variety of social contexts. Consequently, unless the social systems – the families, communities and organisations – in which people live and work provide an environment for developing their potential and resourcefulness, then the lifelong learning goal cannot be achieved. In this respect the Communication goes on to state that in the context of creating a culture of learning across Europe that there is a need ‘to develop learning communities, cities and regions’ (p.21).

Work carried out in small and large organisations, plays a very important part in people’s lives. Therefore, learning from an economic, human and social point of view has to be embedded in the fabric of all work organisations. The Commission’s Communication goes on to state that ‘it is essential to promote actively the development of learning at the workplace and for enterprises and other organisations to become learning organisations’ (p.21).

The European political educational goals of ‘lifelong learning’ and the creation of ‘knowledge societies’ or ‘knowledge economies’ can only be attained if the organisations in which people work are also organisations in which they are learning. So, work organisations must become, at the same time, learning organisations.

### **3. Critiques of the learning organisation concept**

Despite the wide interest in the concept of the 'learning organisation' as is evidenced by the proliferation of research literature as well as popular books, it is a problematic concept and, indeed, a contested one. (See in particular the critiques of Brown and Keep, 2003 and Fischer, 2003 who provided source material for the Cedra learning organisation project.)

There is criticism among many sociologists and researchers in adult and community education but also in the vocational education and training community, for example in Germany (see Fischer, 2003). They see the concept of the learning organisation as being rooted in a normative or prescriptive business-school management concept that is founded on hard-nosed American/Anglo-Saxon economic principles of organisational effectiveness. They criticise the use of sophisticated cultural and psychological theories by modern management to maximise benefits for the company without paying a great deal of attention to ensuring personal learning benefits for employees or workers.

This critique is reinforced by a feeling of being let down by the non-fulfilment of the optimistic forecasts in the 1980s concerning the emergence of more human-centred workplaces in the post-Tayloristic era that would improve the quality of working life for everybody (see Piore and Sabel, 1984). They point out that the reality for many workers, today, is a reincarnation of taylorism in the form of neo-taylorism or perhaps disguised in the form of 'lean-production' or 'flexible working'. This feeling is also related to a sense of disillusionment about the potential of ICT not being exploited to create more autonomy and freedom at work, as predicted by many commentators. In many situations the opposite is the case, with ICT being used as an instrument for the introduction of new types of bureaucracy and control.

The lack of evidence of examples of organisations illustrating, in an empirical verifiable manner, concerning the implementation of learning organisation theory is also cited as a reason for discrediting the conceptual validity or practical usefulness of the concept (see discussion on this point in Cressey and Kelleher, 2003 and also Fischer, 2003). The learning organisation concept is rejected, therefore, by some critics as nothing more than a decontextualised theory that has been popularised in management literature as a formula or recipe for instant success. Furthermore, other critics point out that regardless of the arguments about the validity of the learning organisation concept, it is now seen to be out of date with the interest in it having peaked during the mid 1990s and now being replaced by theories of knowledge management (Brown and Keep, 2003).

For some or all of the above reasons, the concept of the learning organisation has not been taken on board by many in the educational community. They tend to be highly sceptical about engaging with the learning organisation concept, which they firmly locate within the framework of hard-nosed HRM and HRD theory. Extreme critics see it to be nothing more than an effort by management to delude people into becoming 'organisational men and women'. For these, it is a discredited concept and merely a controlling device (see Sennett, 1998).

### **4. Addressing the critiques – the learning organisation as a way of dealing with competing interests**

As already stated, some of the above criticisms were voiced by contributors to the Cedra learning organisation project. They raise serious issues that need to be addressed. However, most of the contributors to this project counter the extreme criticisms in arguing for the validity and relevance of the learning organisation concept as a way of understanding and dealing with the complex and competing interests that have to be addressed within organisations. This paper proposes that it is imperative to continue research and development

work on organisational learning in order to harness human creativity for organisational competitiveness *as well as* ensure learning benefits for everybody working in organisations.

However, this is not to deny that the task of addressing the competing interests of *the organisation* and the *individual workers* is very difficult to achieve. Work is an enormously important but problematic aspect of people's lives. Indeed, the difficulties for both individuals and organisations are accentuated in today's turbulent economic environment that is characterised by growing competition, globalisation, mergers and acquisitions, and job insecurity in the private sector, and privatisation and outsourcing in the public sector. However, the complexity and the delicate balancing act that is entailed in implementing the learning organisation concept – and as rightly pointed out by critics does not come off in many cases – is no more than a reflection of the complexity of the environment that we are living in. Thus, while recognising the difficulties in reconciling business, organisational and individual needs in the context of building learning organisations, it is argued that the challenge of the learning organisation *must* be addressed. (Also see Nyhan and Kelleher, 2002.)

The relevance of learning organisation thinking is corroborated by other recent research work. In a book recapitulating on the results of numerous European research studies on innovation, carried out in the framework of European Union sponsored socio-economic research, Lundvall and Borrás (1999) emphasise the importance of interactive learning that draws on learning organisation thinking. Another recent important book entitled *Handbook of organisational learning and knowledge* containing contributions from 30 leading academics, managers and consultants from ten countries makes a strong case for the relevance of organisational learning <sup>(4)</sup>. It is asserted that: 'the case for the long-term significance of organisational learning and knowledge creation as a field of academic inquiry can be made on two levels; practical relevance and conceptual fruitfulness' <sup>(5)</sup>.

## 5. Moving on to a new agenda

However, we must move onto a *new agenda* in the current stage of the development of the 'European project' which takes up some of the questions raised by critics but also challenges them to evaluate their assumptions and reflect on those criticisms that are misplaced. While keeping in mind that the educational and humanistic dimension is central to the *European social model*, the agenda-setting must follow a path based on negotiation and agreement about shared meanings and interests regarding how businesses can operate in the competitive environment while also enhancing the quality of people's learning at work. The aim is to enable organisations to become more effective and the individual members of these organisations to find meaning in what they are doing and thus realise their potential on behalf of the organisation but also for their own benefit.

This entails building work organisations in which the vast majority of individuals, in particular, in the context of vocational education and training (VET) – intermediate level and front-line workers – and not just managers, are participating in, contributing to and benefiting from learning organisations. It means establishing new relationships between the wider social goals of vocational/professional education and the more business focused goals of human resource development (HRD) that relate to the economic goals of individual companies. This entails new thinking about HRD policies (see Nyhan, 2003) and the relationship between HRD and VET (see Fischer, 2003). It also requires the adoption of new theories of learning in the context of the knowledge society where competence has become more knowledge intensive. The development of knowledge is a co-production issue entailing collaborative learning along learning organisation lines (see Nyhan, 2002).

The prescriptive and simplistic formula-based view of the learning organisation does nothing more than discredit the concept. A learning organisation cannot be created by

applying a formula. It can only be brought to life by the people who work and learn in the organisation. This is not about applying an external theory but rather a construction process based on a lived collective practice. Each organisation has to devise its own unique theory based on its own distinctive practice.

### 5.1 *Multidimensionality and inter-relatedness*

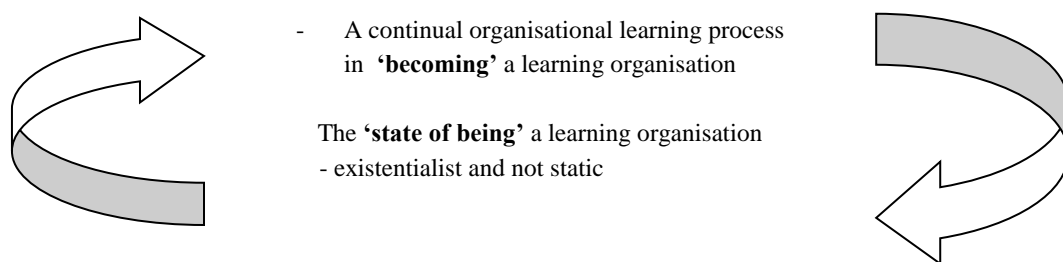
In his book *Images of Organisations*, Morgan (1997) states that people working in organisations use images and metaphors as ways of seeing, understanding and managing organisational dynamics. The learning organisation is such an image enabling people to interconnect two different realities – the world of ‘organisations’ <sup>(6)</sup> and the world of ‘learning’ – or more correctly in the case of the latter, the complex phenomenon of interactive collective learning.

To represent the learning organisation concept adequately one has to use different images. The overarching image of ‘inter-relatedness’ enables one to understand how different dimensions need to be related to each other and seen from a holistic or systemic perspective. From a learning point of view, this entails interconnecting the bottom-up humanistic and developmental educational interests with the more top-down strategic management interests. The aim is not to polarise these but to understand how they relate to, and complement, each other. The learning organisation concept can be put forward as a heuristic tool that enables members of an organisation to generate and construct new ways of understanding and dealing with different kinds of inter-relatedness in workplaces <sup>(7)</sup>.

### 5.2 *The double-sidedness of the learning organisation – ‘a process of becoming’ and ‘a state of being’*

As an illustration of the different dimensions and complexity of a learning organisation we can see how the term can be interpreted in two senses. It can refer to the ‘process of becoming’ a learning organisation, that is – the *organisational learning process*. But, it can also refer to an organisation that has achieved certain aspects of the ‘*state of being*’ a learning organisation (see Figure 1). However, regarding the second meaning, no organisation can claim to have become a learning organisation as the concept implies that an organisation must be *continuously* learning from, and striving to influence, its internal and external environments.

**Figure 1. The double-sidedness of the learning organisation**



An adequate description of a learning organisation has to include both of these meanings - process (‘organisational learning’) **and** goal (‘a learning organisation’). However, it must be stressed that particular emphasis should be placed on the organisational learning process as a continuing transformation process <sup>(8)</sup>. If an organisation, behaving in a smug and self-confident manner, considers that it has achieved the goal of being a learning organisation, it has ceased to be a learning organisation. The advice of Schiller is to be heeded in this respect – ‘Follow the one who is searching for the truth but take no notice of the one who claims to have found it’. A learning organisation, therefore, has to go through a continual process of *becoming* a learning organisation. (See also Cook and Brown (1999) on ‘the generative dance

between organisational knowledge and organisational knowing’.)

### **5.3 *Engaging all the actors***

As already discussed the learning organisation concept has not captured the imagination of many educationalists, including those in the field of vocational educational and training, because of what is perceived to be its narrow hard-nosed business orientation to the detriment of the professional development of individual employees/workers. This is in part due to the fact that, up to recent years, learning organisation theory tended to have a strategic management orientation without being concerned with an analysis of how workers could contribute to, or benefit from, organisational learning (see Ellström, 2003). This situation is also explained by the psychological orientation of dominant educational theories that make many educationalists reluctant to stray from individualistic and formal thinking about learning. Thus, they tend not to be at home with collective, situated and informal notions of learning.

However, the new agenda calls for the development of learning theories that can engage *all* of the actors and interest groups in multidisciplinary research and development work. While Dierkes et al. (2001) state that there has been a move away from seeing senior managers as the principal learning agents towards paying attention to teams and actors at all levels, the discipline of education is singularly missing from the many disciplines outlined in their book as contributing to organisational learning theory. Of the 30 contributors to the book, only one appears to be from a university education faculty. Similarly, Easterby-Smith (1997) also omits education and learning theory from his list of the six disciplines that form the basis for organisational learning theory. Clearly the education dimension must be integrated in the new agenda in the context of building learning organisation that foster lifelong learning. This is a complex matter requiring willingness to change and an openness to boundary-crossing between management thinkers, organisational specialists, educationalists and others.

### **5.4 *European agenda – fostering shared meanings***

One of the main aims of the Cedra learning organisation project has been to promote dialogue across different national and disciplinary boundaries with the view to working towards European shared meanings. This is part of the ‘European development project’ (see Elliot, 1998, and Nóvoa and Lawn, 2002). The manner in which work is organised and the nature of the learning values and processes that underpin it will play a central role in shaping the future European agenda regarding the quality of life for the average man and woman.

In the present state of the development of the European Union, the German philosopher Jürgen Habermas states that ‘Europe cannot just be based on common economic or political interests but also on some founding ideas and values’ (see Habermas, 2001). Elsewhere Habermas has argued that – ‘what makes the core of the European identity is more the character of the learning process than the outcome of it’ (quoted in Therborn, 2002: p.15). Taking up this point (and keeping in mind the earlier view of the learning organisation as being both goal-oriented and process-oriented) the European learning process among the research community in studying the learning organisation is as important as the results attained. The Cedra project has attempted to situate itself within this larger European collaborative learning process. There is a distinctive European tradition in the area of innovation in work organisation. This, it is argued, can be postulated as forming, what might be called, the European roots of organisational learning. Thus, the European organisational innovation tradition fostering employee participation and human resourcefulness could be configured as organisational learning.

The intention here is not to be Eurocentric and neglect to acknowledge the enormous American and Japanese contribution to innovation in the fields of organisational development, HRD, organisational learning and knowledge development. Rather, the purpose is to take



stock of and explore the European tradition of innovation in work organisation with the view to using it as a foundation to be built on in drawing up and addressing today's agenda.

## 6. Understanding the tensions in organisational learning

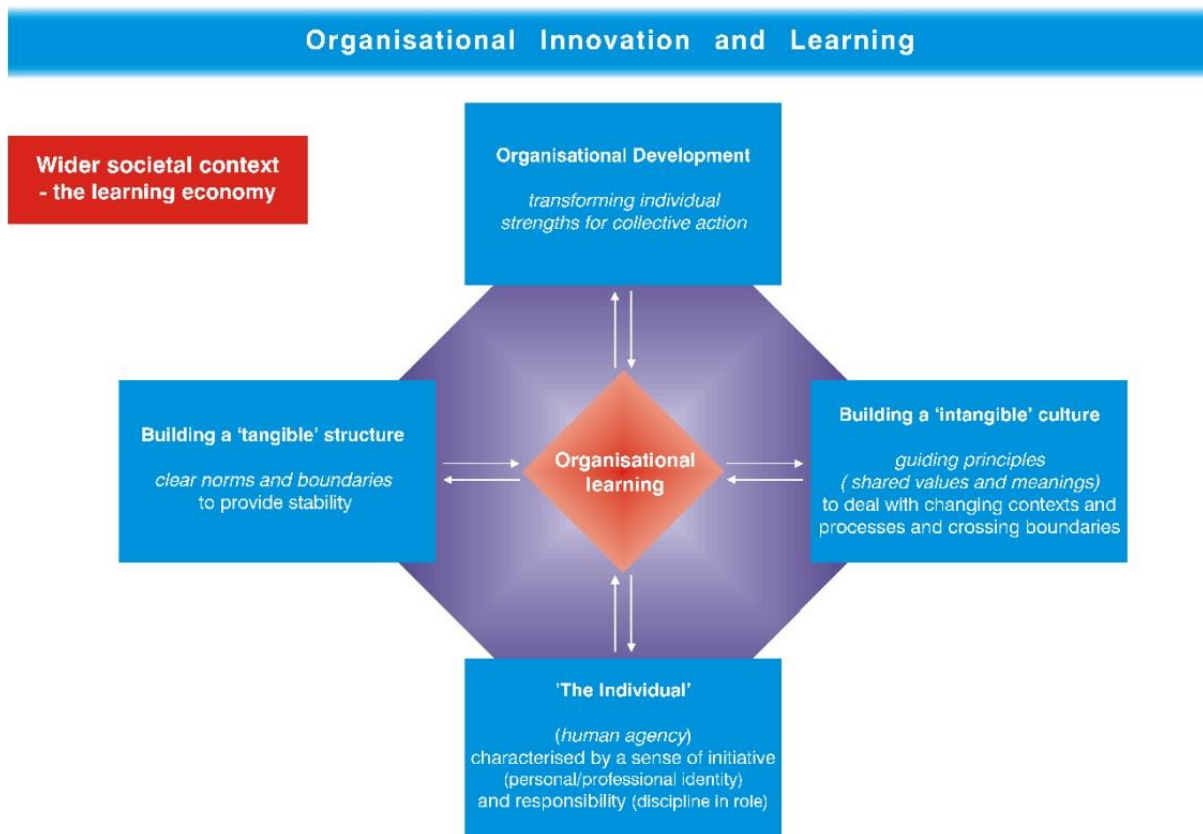
One of the predominant impressions one gets in analysing the different papers assembled under the ambit of the Cedra learning organisation project, is the enormous complexity of the tasks facing managers <sup>(9)</sup> of modern organisations. In the context of organisational learning, today's managers have to be able to deal with numerous conflicting interests and goals. In the first place, they have to give shape to an organisation to pursue certain strategic directions, while at the same time being open to constant change. Second, they have to reconcile individual idiosyncratic behaviours and learning with that of orchestrating organisational behaviours and learning. The case studies of British Telecom (Cressey, 2003), Deutsche Bank (Reimann, 2003) and Guinness (Findlater, 2003), in particular, illustrate how managers and employees and their representatives are struggling to learn to deal with a constantly changing turbulent environment. Tomassini (2003) discusses the knowledge development challenge that faces modern companies. The paper of Brown and Keep (2003) questions the degree to which company productivity and individual learning needs can be accommodated in today's organisations. Fischer (2003) takes up the issue of reconciling individual and organisational learning. Both of these latter papers share a concern with that of Woerkom et al. (2003) to address the wider agenda of learning from a personal or occupational/professional/career identity and development perspective. The papers by Sambrook et al. (2003) and Poell and Chivers (2003) show how human resource development departments and HRD professionals are struggling to transform their traditional roles, moving from that of 'providing training' to that of becoming consultants to line management so that they can take direct responsibility for integrating organisational, team and individual learning within everyday work contexts.

A central hypothesis that we are proposing on the basis of our reflections on the issues explored by the authors who contributed to the Cedra project is that the key to organisational learning lies in the capacity to understand and see how the different and often seen as opposing dimensions of organisational life can be reconciled. Modern organisational life is full of real and apparent tensions, which are derived from a complex external and internal environment that requires a host of different objectives to be reconciled. All of the different actors, managers, HRD specialists and employees, have to be able to understand the reasons for these tensions and be able to reconcile them if they are to learn to live and work in modern organisations.

The two major tensions, in implementing organisational learning, which we wish to discuss, are those between:

- (a) the need to build a *tangible organisational structure* but also simultaneously promote an organisational *culture based on intangible shared values and meanings*; and
- (b) the need to promote cohesive and effective collective/organisational strategies while at the same time fostering an environment for individual initiative and autonomy and individual development.

**Figure 2. Understanding the dimensions of organisational learning**



In Figure 2, these two sets of tensions are depicted in the form of continuums running along horizontal and vertical axes. The first one, relating to the horizontal axis, has to do with the contrasting demands between, on the one hand, the need to formalise, objectivise, make explicit and transparent, that is make tangible, while on the other hand, there is also the need to pay heed to the informal, the subjective, the tacit – the intangible.

The second tension – on the vertical axis – focuses on the need to devise learning strategies to meet organisational (corporate) identity and performance objectives while at the same time encouraging personal responsibility and initiative based on a sense of individual identity. This figure can be seen as a representation of a conceptual framework for understanding the nature of organisational learning that occurs at the intersection of the two axes and has to do with the management of the tensions along the two continuums. There is also the wider societal context – the learning economy – which also has to be taken into consideration. It is our contention that the dynamics within these continuums are often not adequately explained in much of the populist management and organisational consultancy literature, giving rise to oversimplified understandings and confusion among managers and policy makers. The introduction of a modern form of management is often portrayed as the adoption of a new template to replace the old tayloristic one, that is, simply moving from the left side of the horizontal axis to the right side. However, this can only lead to a polarisation. The issue at stake in organisational learning is bringing the two dimensions of the horizontal continuum into dialogue with each other. They are part of a 'dialectic' in the classical meaning of this term in Greek language (which is related to the word 'dialogue') and that conveys the meaning that to understand reality one has 'dialogue with', 'converse with' or 'speak across' the different dimensions of reality.

An organisation has two dimensions – *objective/structural* and *subjective/cultural* – and both have to be taken into account in organisational learning. In rejecting, what he terms the 'bastion of linearity', Hampden-Turner (1990) states that learning is about the ability to

resolve dilemmas that appear and reappear in constantly changing forms. He rejects the linear 'either-or' approach, instead arguing that the key to learning and progress is based on a 'both-and' approach which entails dealing with a configuration of values rather than the selection of mutually exclusive alternatives. Thus organisational learning is about dealing with the creative tension between *structure* and *culture* on the one hand, and the *individual* and the *organisation* on the other hand.

The organisational learning agent, therefore, must be Janus-like, looking at two directions at the same time. The role of human resource development and continuing education training professionals and researchers is to assist managers to mediate the conversation between the right and the left and the top and bottom dimensions of the figure presented above. Learning facilitators and researchers have a key role to play in fostering what Nonaka and Takeuchi (1995) refer to as 'emerging spaces' and Engeström (1987) following Vygotsky (1978 and 1987) calls 'zones of proximal development', within which people can dialogue and experiment in order to learn to work together in constructing new realities.

### **6.1 Managing the dynamics between 'structure' and 'culture'**

The horizontal dimension of the axis raises a major challenge for many traditional organisations to break out of the 'bastion of linearity' on the left hand side of Figure 2. However, this does not entail abandoning 'structure' but it does mean embracing a process-oriented vision of an organisation according to which it is constantly being shaped by 'intangible' factors - namely the aims, intentions, feelings and values of its members. Whereas the organisational features on the left side of the figure are tangible and lend themselves to being articulated in an accountable and transparent manner, the characteristics on the right side are based on intangible human knowledge, thoughts and feelings ('emotional intelligence' – Goleman, 1997, 2000) and interrelationships. (See also Polanyi, 1962 on 'tacit knowledge'.) When these relationships are fashioned by trust and mutual responsibility, they provide the conditions for sharing personal and tacit knowledge that is a prerequisite for collaborative organisational learning. (Puttnam, 2000, 1993a and 1993b refers to this as 'social capital'; see also Nahapiet and Ghoshal, 1998.)

### **6.2 Addressing organisational demands as well as individual needs**

Ellström (2003) states that while there has been a research literature about organisational learning for more than three decades, the main focus has been on strategic organisational management questions. Thus the issue of 'strategic learning' concerned with organisation development has tended to be separated from 'operational learning' which was seen to be covered under the heading of skills development undertaken in the context of vocational education and training. Ellström points out that it is only in more recent times that the research focus has widened to examine the role of frontline employees and workers. This has been given impetus through the advent of workplace teams <sup>(10)</sup> in many companies in the context of the emergence of flatter and flexible organisational structures and the need to ensure that workers could progressively enhance their levels of competence to carry out a range of tasks assigned to the team rather than an individual worker (see du Roy, 1997).

Prior to the arrival of new organisational structures, the contribution of frontline workers to very many organisations, was seen to be simply fitting in with a bureaucratic top-down organisational structure. According to these perspectives, organisational learning (although it was not called that) is seen to cascade from senior management via the different intervening management and supervisory hierarchical layers of the organisation to the level of the 'frontline workers'. In referring to this view of organisational learning as 'behaviour-oriented organisational learning theory', Tsoukas (1996) states that it is based on the assumption that individuals are seen merely as 'instrumental rule-followers'. Even today, it is not uncommon to find the 'lived practice' of many companies to be in line with the above viewpoint.

Tsoukas (1996) points out that in adopting such working models, organisations are going against the grain of human nature, because in reality, workers are ‘active agents’ who draw on knowledge that is contextual and changing constantly. The end result of persisting with the instrumental systems view is that the full capacities of individuals to contribute to organisational performance are not harnessed. Neither are they contributing to the learning of the organisation.

Many managers of organisations find themselves caught up in this dilemma through no fault of their own. Often this is not obstinacy but a lack of understanding about how organisations behave. They do not have an understanding of alternative strategies that could release them from the organisational model that they first learnt. <sup>(11)</sup>

#### *6.2.1 Winning commitment through participative work and learning*

A key role for management and the HRD department is that of developing work environments in which people feel that they are making a contribution – in other words feel that they belong. This is about winning commitment through participative work and learning environments.

This is one of the key points running through the papers of Franz (2003) van Woerkom et al. (2003) Findlater (2003) and Ellström (2003). All stress the importance of building participative environments. Van Woerkom, for example, refers to the importance of ‘social integration’ in the workplace (along with promoting ‘autonomy’ and ‘competence’) as prerequisite motivating factors for learning. Kelleher and Cressey (2003) bring the concept of ‘participative workplaces’ to a different level in arguing that ‘social dialogue’ between management and employee representatives leading to strategic participation can be seen as a form of ‘strategic learning’.

## **7. Key principles to ensure that organisational learning can take place**

This part of the paper looks at the role of organisational leaders and learning specialists in correctly interpreting the patterns of the organisation and devising ways in which the balance can be struck between the different competing dimensions. The key issue is keeping one’s eyes on multiple objectives and orchestrating mutual, interactive and dialogical learning processes.

### ***7.1 Avoiding ‘dualism’ and the ‘quick-fix’***

‘Human-systems thinking’ advocates warn us that, in attempting to resolve problems, there is often a strong tendency towards ‘dualism’, that is splitting off the ‘easy to manage parts’ of the organisation from the awkward bits (see Reed and Palmer, 1972). So, for example, top-down structural or technology-centred solutions to organisational change are often adopted instead of addressing the more tricky and not so easily controlled human factors. Senge (1990) emphasises that organisational learning is about trying to make sense of the whole picture, through using ‘the fifth discipline’ of ‘systems thinking’. According to systems thinking, a splitting approach amounts to ‘single-loop’ learning which only addresses the symptoms of the problem to the detriment of finding a more fundamental and lasting solution based on ‘double-loop’ learning or deuterio learning (Argyris and Schön, 1978).

Also in contrast to the closely related ‘quick-fix’ approach, Ennals and Gustavsen (1999) point out that sustained innovation and change entails a long period of development. Similarly, Engeström (2001), in commenting on ‘expansive transformations in activity systems’ states that qualitative transformations entail long cycles.

## **7.2 *Seeing conflict as providing opportunities for learning***

Although conflict is very often seen to be an obstacle to learning, in fact the process of resolving conflict can be one of the key learning processes in an organisational learning context. Engeström (2001: p. 151) criticises organisational learning theories, which assume that the knowledge development assignment is unproblematic, leading to the impression that learning consists of 'smooth and conflict-free socialising'. On the contrary, for Engeström 'cognitive conflict' is the occasion for a deep form of learning, which he terms 'investigative learning' or 'expansive learning'. So, while there is undoubtedly conflict between the different poles of the horizontal 'tangible structure' versus 'intangible culture' and 'individual needs' versus 'organisational needs' as outlined earlier, this can give an indication of the learning agenda to be tackled.

The organisational learning arena in the centre of Figure 2 which, using the terminology of Vygotsky (1978, 1987), can be seen as a 'zone of proximal development', is not a 'comfort zone' as there is undoubtedly pain in learning and perhaps more so in unlearning – in letting go of one's former way of viewing things – resolving conflicts and/or coping with unpleasant realities (see Hedberg, 1981).

## **7.3 *Transforming 'industrial relations' into 'learning relations'***

As an illustration of how potential conflict situations can give rise to positive learning outcomes, Kelleher and Cressey (2003) discuss the manner in which the industrial relations arena that is often characterised by 'negative conflict' can be transformed into a learning arena. In pointing out that this is not a utopian picture, Cressey (2003) shows how in British Telecom the trade unions are, in fact, trading off their traditional power position of being able to oppose and block management for one in which they have the chance jointly to determine company strategy with management.

In a comprehensive but not uncritical overview of the development and evolution of 'social dialogue' in the European Union, Hyman (2001) <sup>(12)</sup> a leading comparative analyst of European industrial relations, states that successful social partnerships require strategic learning. He sees this strategic learning 'as an iterative process in which rules of the game are developed interactively as the nature of the game itself evolves' (Hyman, 2001: p.56).

## **7.4 *Developmental work and learning – prerequisites for organisational learning***

There is a great deal of truth in the saying that building a learning organisation is not so much about introducing expensive and innovative learning programmes but rather changing the way that work is organised so that the work itself is conducive to learning. When people have the motivation to think for themselves and cooperate with each other across the organisation, sharing their knowledge and engaging in collaborative problem solving, they are building the fabric of a learning organisation. This means that the content of the work is such as to motivate people, engaging their commitment through giving them responsibility (see van Woerkom et al., 2003). In other words, the work is stretching their potential thus leading to their development. The kind of work can be called 'developmental work'. It is a prerequisite for organisational learning.

To explain the relationship between developmental work and organisational learning, Ellström (2003) uses a conceptual framework developed within the field of 'cognitive action theory'.

According to Ellström, developmental learning is fostered when the actions or work tasks to be undertaken are 'knowledge based' or require 'reflection' or 'evaluation' as distinct from those actions that are 'rule-based' or entail 'routines'. In other words, the potential for developmental learning is increased when people have challenging tasks to undertake and are facilitated to learn from doing those tasks through being supported to reflect on, and learn

from, those tasks.

Ellström identifies the following characteristics of developmental work that promote developmental learning:

- high degree of task complexity – variety and control regarding the ‘actions’ being undertaken;
- high degree of task-relevant knowledge required – offering possibilities for personal development;
- opportunities for feedback, evaluation and reflection on work undertaken that requires deliberation and choice;
- possibilities for employee participation in shaping the design of the work environment and bottom-up collective learning, as distinct from more formalistic top-down and standardised approaches;
- formal participation in problem handling and developmental activities.

However, despite acknowledging the importance of developmental learning, Ellström (2003) stresses that ‘adaptive learning’ should not be played down. On the contrary, in a balanced organisational learning context, the different varieties of learning coming under the headings of ‘developmental learning’ and ‘adaptive learning’ should not be opposed but seen to complement each other. What seems to be required is a productive balance and a kind of pendulum movement between these basic varieties of organisational learning.

### **7.5 *Importance of a supportive learning environment***

Despite the emphasis placed on developmental work above, developmental work tasks on their own do not make for learning. A supportive work and learning environment is necessary in which people get feedback and are encouraged to take time out for reflection; and are provided with learning resources in the form of work based education and training schemes. Van Woerkom et al. (2003) stress the importance of motivation factors that promote work based informal learning. These reflect the feelings among employees that they are socially integrated in the workplace, have a certain autonomy and a basic degree of competence to begin with. Ellström (2003) refers to the need for learning resources and support and time for interaction among workers in the analysis of, and reflection on work situations.

The role of the manager, therefore, and those with responsibility for guiding learning, from the internal HRD department, is to help set up an arena for learning through which the intelligence of everyone in the organisation is harnessed. This arena can be seen as a ‘zone of proximal development’ in the organisation’s activity system (see Vygotsky, 1978, 1987) and Engeström (1987).

### **7.6 *Informal learning***

An empirical Europe-wide study undertaken by Cedefop in the mid 1990s, on the learning effects of work organisation, examined the extent to which the adoption of ‘new’ horizontal and team-work forms of work organisation had an impact on the development of frontline workers’ skills and competences (Méhout and Delcourt, 1997) <sup>(13)</sup>. The study showed that workers were learning due to the fact that they had autonomy to shape the way work was planned and carried out, for example, in semi-autonomous teams. In other words, as a by-product of actively influencing how the tasks of the organisation were carried out, workers learned new knowledge and skills. Or, to put it another way, the introduction of new work organisation principles had informal learning effects.

A Norwegian study went further, showing that ‘learning through daily work’ or informal learning scored significantly higher than ‘organised training at work’ and ‘vocational training/school studies’ for both employees and employers (see Skule and Reichborn, 2002: p.14). A comprehensive study of some of the top American companies by the Education

Development Center (EDC) concluded that ‘70 % of what people know about their jobs they learn informally from the people they work with’ (Dobbs, 2000: p.54).

### **7.7 Who leads the learning organisation?**

The emphasis on self-organised learning and informal learning gives some people the impression that learning somehow takes place all by itself without any intervention from leaders or teachers. However, as depicted on the right hand side of Figure 2, the implementation of a learning organisation entails the adoption of a new form of management that is able to give the lead in promoting intangible resources such as the willingness to collaborate in sharing knowledge throughout the organisation. This is what is meant by fostering a culture of learning. This has to be fostered, promoted, through winning people’s commitment rather than the mere establishment of structures or setting up a HRD department. In their analysis of European firms, Docherty and Nyhan (1997) identified the leadership role of the role of the Chief Executive Officer (CEO) as being a key factor in building companies that place a value on learning as a strategic company policy. This entails a degree of risk as the manager is moving out of the comfort zone of being a *manager of structure* to that of *fostering a culture*. The chief executive, with the support and assistance of the HRD department, therefore, is the lead teacher in the learning organisation fostering an ethos of mutual learning and mutual teaching at all levels throughout the organisation.

In arguing for equal emphasis for organisations to be ‘teaching’ and ‘learning’ organisations, French and Bazalgette (1996) state that the main role of the chief executive is ‘setting the context’. They see setting the context as ‘a teaching activity’.

If managers set a context that respects collaborative learning based on transparency and openness, they are teaching the members of an organisation about how to engage in mutual learning.

### **7.8 Balancing the needs of the company with wider societal needs**

Fischer (2003) takes up the point in a German context that learning organisation-oriented HRD thinking is at variance with the objectives of traditional vocational education and training (VET). He states that while the learning organisation notion is about permanent change – continuing transformation – the German dual VET system is ‘working against the idea of permanent change in seeking to promote social stability through regulatory frameworks’. In this regard, he says that the German concept of *Beruf* (occupational or professional identity) is regarded by some of those espousing learning organisation and HRD perspectives to act as a barrier to corporate restructuring and change. The *Beruf* concept is seen to be both an internal barrier, preventing workers from taking on new tasks, and also an external barrier that restricts peoples’ room for manoeuvre because their occupations are defined in relation to a limited number of work tasks and are bound by rather rigid qualification and remuneration systems.

In looking at ways in which the clash of interests between VET and HRD could be resolved in a German context, Fischer (2003) summarises a discussion about this matter that took place among HRD managers in a number of large German companies such as Bayer, IBM, Siemens and Volkswagen. The following three scenarios are put forward:

#### **(a) conservative position**

The existing VET system as a semi-autonomous department within the company should be retained. The dual system building around clear occupational profiles is considered to be flexible enough to be capable of being reformed to meet the needs of modern enterprises;

#### **(b) integration of VET and HRD**

In many companies VET and HRD are being successfully integrated within one department. It is argued that the integration of work and learning makes it inefficient to have a separate

VET department;

(c) outsourcing and privatising VET

Companies that have adopted this approach, such as Volkswagen, see VET as a service that has to be negotiated and paid for. Employees are encouraged to take responsibility for their own learning – sometimes doing so in their own time and even paying for it themselves. This latter approach differs very much from the former practice where the contribution of VET was located within a much wider socio-economic framework.

Fischer concludes by saying that while the debate continues in Germany about who should benefit most from in-house training – the company or the individual – it is becoming very difficult to strike the right balance in today's world dominated by global competition. Nevertheless, despite these difficulties, he argues that we should strive for a solution which accommodates both interests in an equitable way.

## 8. Conclusion

The objective of this paper, and the Cedra learning organisation project it is reporting on, has been to analyse different strands of European research dealing with the issue of the learning organisation. It has attempted to identify and discuss the key points emerging from this research, with a view to promoting debate and contribute towards a future European research and development agenda.

The paper has located itself within a European context promoting shared understandings about how Europe can address its goals in relation to becoming a knowledge society and implementing a lifelong learning area. The learning organisation challenge is seen to be central to addressing these goals. To do so however, the European concept of the learning organisation must bring educational benefits to individuals as well as strengthening the organisational effectiveness of enterprises and public bodies. Europe, conceived as a 'locality', can draw on its own distinctive traditional strengths to shape its future course and build new European learning organisations. This entails learning from its past history but also developing a capacity to be prospective in identifying and facing up to the issues on the new agenda.

In looking at past research agendas we have seen that some authors were wedded to the need to promulgate the 'one best way' or the formula to be followed to become a learning organisation. However, the future agenda will have to move away from the search for the one best way and begin to draw on multiple sources – based on human and economic goals and values and organisational and educational learning theories. A central point to be addressed is that of managing the dialogue between the different dimensions of organisational life, between the tangible aspects dealing with structure and the intangible aspects dealing with building a culture. The importance of the intangible culture shaping structure, rather than the other way round, was stressed. Culture is something that must be built together if it is to give meaning to structure.

Another key issue discussed related to the need for everybody in an organisation to find a common meaning about the aims of the organisation to which they belong. This allows a cohesive organisational identity to be built that does not conflict with the interests of individuals in finding their own individual identity, thus gaining personal or professional benefits while working for collective goals.

As organisational realities are complex, the learning organisation theory must address complexity. Simplistic formulas cannot be imposed on reality. In conclusion, the learning organisation serves as a visionary image that enables organisations to understand their contexts, make sense of their practice and exploit their own unique situations to meet economic and social goals for the benefit of all.



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(<sup>1</sup>) Two complementary volumes are being published together as a set by Cedefop and the Office for Official Publications of the European Communities. The main title of both volumes is the same – *Facing up to the learning organisation challenge*. Volume I which has the sub-title - *Key issues from a European perspective* attempts to provide an analytical overview of the main questions emerging from a number of recent European research and development projects related to the topic of the learning organisation. Volume II containing 15 papers, written in the framework of the above mentioned research projects, has the subtitle – *Selected European writings*.

(<sup>2</sup>) One of the objectives of Cedra is to bring together researchers who have been working on separate but related European research projects, to collaborate in carrying out a knowledge-sharing/development project. Thus, as well as valorising existing work, new ‘value-added’ resources, such as networks and publications, in book and web formats, are produced that lay the ground for wider networks and knowledge development activities (for more information on Cedra, see <http://www2.trainingvillage.gr/etv/cedra>). In carrying out the ‘Cedra learning organisation project’, Cedefop received expert assistance from a team of researchers that was assembled by the European Consortium for the Learning Organisation (ECLO). This entailed bringing together a small team of researchers from different European countries and research disciplinary backgrounds – the authors of this paper – to assemble, edit and reflect together on the research papers of different projects with the view to identifying underlying patterns regarding the issues raised, and discussing the dilemmas encountered and barriers faced concerning the implementation of the learning organisation concept. In carrying out this task, as well as drawing on the above mentioned research reports and other literature and resources, the authors also gave themselves the ambitious objective of coming up with new conceptual frameworks that make sense of, and go beyond, the material presented in the above mentioned papers

(<sup>3</sup>) The research and development projects analysed in the course of the Cedra project have been undertaken in the framework of the following European Union research and development programmes/actions - a) *4<sup>th</sup> and 5<sup>th</sup> European research framework programmes*; b) *Leonardo da Vinci action programme* for the development of vocational education and training policies; c) *Adapt programme* dealing with the development of employment policies to respond to industrial change; d) the *Marie Curie ‘researcher mobility programme’*; and e) the *Cedefop Research Report*. In particular, the results emanating from the European Union research network project - ‘Forum for European research in vocational education and training’ have been drawn on. This project has been coordinated by the *Institut für Technik und Bildung* of the University of Bremen (see: [http://www.itb.uni-bremen.de/projekte/forum/Forum\\_framesets.htm](http://www.itb.uni-bremen.de/projekte/forum/Forum_framesets.htm)). Another major source of material has been the ‘Partnership and Investment in Europe project - the role of social dialogue in human resource development’ (known as PIE). This project that was funded by the EU Leonardo da Vinci programme, was coordinated by the European Consortium for the Learning Organisation (ECLO). This consortium, founded in 1992 and comprising company managers, consultants and researchers, is coordinated from its main office in Belgium (see: <http://www.eclo.org>).

(<sup>4</sup>) This massive work, coordinated by the *Wissenschaftszentrum Berlin für Sozialforschung* and edited by Dierkes et al (2001) took over six years to complete. It runs to a hefty 979 page publication that sets out to bring together many of the current streams of thinking on organisational learning dispersed in different disciplines and subdisciplines. An annotated bibliography was produced earlier by the same team in a book and CD format (Dierkes et al, 1999.) All of this work took place in the framework of the ‘*Ladenburger Kolleg*’ on organisational learning in various environmental conditions.

(<sup>5</sup>) While the term ‘organisational learning’ rather than the ‘learning organisation’ is the one that is preferred in the Dierkes et al. book, the authors of this paper see the notions of the ‘learning organisation’ and ‘organisational learning’ to be two sides of the same coin. The ‘learning organisation’ can be seen as the *goal* to be achieved while ‘organisational learning’ is the *process* through which this goal is achieved. (For a discussion on the relationship between the terms ‘learning organisation’ and ‘organisational learning’ see part 5.2 of this paper).

(<sup>6</sup>) For some (perhaps many) people the word ‘organisation’ has a rather negative connotation. The organisation is seen as a ‘bad object’ subjugating ‘good’ individuals to bureaucratic soul-destroying structures and systems. This viewpoint is often informed by a belief that ‘if only we could do away with organisations and create *communities* based on personal relationships we would solve all of our problems’. However, calling work organisations communities does not negate the fact that workplaces are artificial constructs that bring together people from very different backgrounds, who may not necessarily like each other, but find themselves associated together and assigned interlinked roles, to carry out a common pragmatic project. In this respect, the more neutral word ‘organisation’ captures the pragmatic nature of the work situations in which most people find themselves.

(<sup>7</sup>) One is always challenged to come up with a definition of a learning organisation. However, in criticising those who come up with simplistic formulas that distort reality there is a risk in taking up this challenge. Nevertheless, with the proviso that it should be noted that all definitions have their strengths and weaknesses, the following definitions are presented :

- (a) Learning organisations are places ‘where everyone learns and develops through the work context, for the benefit of themselves, each other and the whole organisation, with such efforts being publicised and recognised’ (European Communication, 2001: p.14).
- (b) ‘A learning company is an organisation that facilitates the learning of all its members and continuously transforms itself’ (Pedler et al., 1991).
- (c) ‘Learning organisations are organisations where people continually expand their capacity to create the results they truly desire and where people are continually learning how to learn together’ (Senge, 1990: p.3).

In a comprehensive review of the learning organisation literature, Snell (2001) states that although there is a profusion of learning organisation paradigms, there is coherence among them around a commitment to collective learning and

development.

(<sup>8</sup>) Easterby-Smith (1997) makes the following distinction between 'organisational learning' and 'a learning organisation'. He sees 'organisational learning' as being discipline based (derived from six distinct academic disciplines, such as management science, sociology and organisation theory and interestingly omitting educational and learning theory). On the other hand, he sees the concept of the 'learning organisation' as being multidisciplinary with an emphasis on action and practice. However, the emphasis placed by the authors of this book is on the mutual engagement of theory (academic disciplines) with 'practice'. From a comprehension point of view, the multidisciplinary nature of the 'learning organisation' concept is both a strength and a weakness. While it mirrors the complexity in reality, highlighting the need for boundary-crossing between different disciplines and organisational functions, this does not make it any easier for some people thinking within traditional disciplinary boundaries to grasp or take on board the concept of the learning organisation. (See Cressey and Kelleher, 2003.)

(<sup>9</sup>) The term manager is used to indicate those who have responsibility for giving leadership within an organisation. While primarily referring to those formally charged with leadership responsibility and who, in the English language, would be termed Chief Executive Officers, it can also refer to others who have leadership responsibilities such as social partner representatives, and particularly, in the context of this book, human resource development managers.

(<sup>10</sup>) The introduction of teamwork in many companies throughout the late 1980s and early 1990s, was in many respects, due to the great interest in Japanese work and learning strategies such as Total Quality Management, which has been termed 'Toyotism', and Kaizen, the Japanese term for 'continuous improvement strategies'. (See Womack, 1990.)

(<sup>11</sup>) Reed (1976) and Hutton et al. (1997) discuss a methodology entitled 'organisational role analysis' that enables people to stand back and consider other images or ways of understanding their organisation and in particular understanding how they exercise their roles within their organisation.

(<sup>12</sup>) Hyman explores the complex historical evolution of the concepts of 'social partnership' and 'social dialogue' from national and European perspectives. In examining the diversity of meanings about the concepts in different EU countries, he discusses the ambiguities and uncertainties that underlie much current usage of the two terms.

(<sup>13</sup>) Forty seven case-studies, comprising manufacturing, process and service-sector companies, were undertaken in the following nine countries - Belgium, Denmark, France, Germany, Italy, Netherlands, Portugal, Spain and the United Kingdom.

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## **ANNEX: Research papers analysed in the Cedra learning organisation project**

### **Developmental learning - a condition for organisational learning**

by Per-Erik Ellström

An earlier version of this paper was written in the framework of the European Union research network project - 'Forum for European research in vocational education and training'.

### **Challenges and open questions raised by the concept of the learning organisation**

by Martin Fischer

This paper is a revised version of the one written in the framework of the European Union research network project - 'Forum for European research in vocational education and training'.

### **How organisations learn - a theory of learning and organisational development**

by Hans-Werner Franz

This paper is a revised version of the one written in the framework of the European Union research network project - 'Forum for European research in vocational education and training'.

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by Alan Brown and Ewart Keep

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by Peter Cressey and Michael Kelleher

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by Michael Kelleher and Peter Cressey

This paper is based on the European Union funded Leonardo da Vinci Programme project 'Partnership and Investment in Europe - the role of social dialogue in human resource development'.

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by Barry Nyhan

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